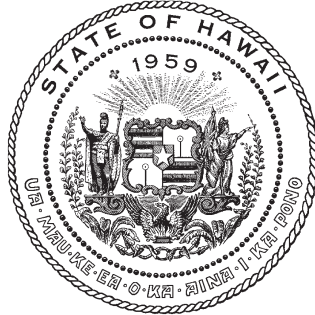


**STATE OF HAWAII  
DEPARTMENT OF TAXATION**



**General Information  
and Scannable Specifications  
for  
Schedule CR (Rev. 2017)**

**Contact Information**

Hawaii Department of Taxation  
Technical Section  
Attn: Sharlene Tagami, Forms Coordinator  
830 Punchbowl Street, Rm 126  
Honolulu, Hawaii 96813

Telephone: (808) 587-1577  
Fax: (808) 587-1584  
E-mail: Tax.Technical.Section@hawaii.gov

**Hawaii Software Vendor Website  
Address:**

[tax.hawaii.gov/vendor/](http://tax.hawaii.gov/vendor/)

**Note:** Reproductions must meet requirements as established in our current Forms Reproduction Policy and within this document.

**Schedule CR (Rev. 2017)****General Information and Scannable Specifications**

This document provides software vendors with the requirements for reproducing Schedule CR. Schedule CR is designed for electronic scanning that permits faster processing with fewer errors. Software developers who reproduce, develop, or distribute Schedule CR must create the form so the variable data (specified fields containing

taxpayer information) are printed in a fixed format that can be read by the Department's IBML scanners.

Substitute scannable forms **MUST** meet requirements as established in this document and our Forms Reproduction Policy and be approved prior to release or distribution.

**GENERAL INFORMATION****1. Substitute Form**

- We highly recommend you use the Department's official Form Schedule CR PDF.
- If you do not use the Department's official PDF, the substitute form must match the Department's form in layout and appearance including **bold** and/or *italics* fonts as they appear on the official form.
- Lines of text in a paragraph must break at the same location as the official form.
- All forms and variable data must have a high standard of legibility for printing.
- Photocopies of the scannable form must not be submitted to the Department for processing.
- Substitute scannable forms must be proofread prior to submission.

**2. Paper and Ink**

- The paper size is 8.5 inches by 11 inches, the same size as the Department's original form. The paper weight must be at least 20 pound white bond and the page orientation is portrait.
- Black ink should be used in printing the text on the form and the variable data.

**3. Variable Data**

- All variable data fields must utilize 12 pt Courier font, and all variable text data must be in uppercase letters. Text labels must not touch variable data.
- All variable data fields require exact placement.
- Use a bold X (**X**) as a checkbox indicator. See exhibit for exact placement. The use of a checkmark is not acceptable.

**4. Variable Data Delimiters**

- Tax Year Beginning and Tax Year Ending must be printed with spaces between the dash (-) delimiter. For example:  
MM - DD - YYYY  
(2 digits for month, followed by a space, followed by a dash (-), followed by a space, followed by 2 digits for day, followed by a space, followed by a dash (-), followed by a space, followed by 4 digits for the tax year ending).

**5. Dollar Amounts**

123456789

- Do not use commas as thousand separators.
- Do not use leading dollar signs.
- Amounts are right justified.
- Amounts must be rounded. Dollar and cent signs should not be used when the field is rounded to whole dollars.

**6. Testing and Approval of the Scannable Form**

- The printed 6x10 grid of the form on acetate overlays will be mailed to software vendors listed on our Hawaii software vendor website. If you have not received the overlays, please contact the Forms Coordinator. This should assist in the exact data field placement. Verify your test data filled facsimile samples with the overlays prior to submitting them for testing. If the samples do not match the overlays within 1/16", do not submit them for approval as they will be rejected.
- A minimum of 5 hardcopy test samples must be provided to ensure proper testing including 1 hardcopy test sample that contains all maximized fields (one alpha "X" or numeric "9" character space with no leading or trailing spaces).
- Test samples must be originals. Photocopies, fax submissions, etc. will not be accepted.
- Test samples must be populated with unique sample variable data showing different scenarios.
- It will require 1 to 2 weeks, upon receipt by the Department, to verify the accuracy of the submitted samples.
- Approval of the facsimile must be obtained from the Department **prior** to filing.
- Schedule CR (Rev. 2017) cannot be filed until 2018.

## SCANNABLE SPECIFICATIONS

### 1. Layout

- The form was designed on a 6x10 grid. See exhibits.
- Open space around variable data fields should be adhered to as much as possible except for the areas that do not require optical character recognition. Do not place any additional information in these areas.

### 2. Hawaii Vendor I.D. Number

- Print your 2-digit Hawaii Vendor I.D. Number following the "ID NO" label at the following positions:  
Page 1, on row 18 at columns 71 and 72;  
Page 2, on row 63 at columns 53 and 54.
- See our Hawaii software vendor website for your Hawaii Vendor I.D. Number. If your company is not listed, please contact the Forms Coordinator.

### 3. Anchors

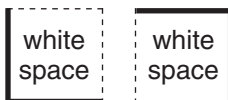
- Anchors are required on every page. The scanning equipment looks for anchors printed on the form. Exact placement of the anchors are required.
- The vertical and horizontal edges of the anchors must be the same length of 0.5 inch long and 0.0278 inch thick.
- There are **two** anchors on each page.
  1. The top right anchor should extend from the beginning of column 76 to the end of column 80 and should rest at:  
Page 1, the top of row 16;  
Page 2, the top of row 11.



2. The bottom left anchor should start at the beginning of column 6 and extend through the end of column 10 and rest on the top of row 64 for Pages 1 and 2.



- The tolerance is 1 mm (1/4 of a grid).
- No data or other stray marks are allowed to encroach within the white space in a 0.5 inch square of the anchor.



### 4. Barcode

- A 1D barcode is specific to the form. The property of the 1D symbology barcode uses 3 of 9 (Code 39).

- Placement of the barcode is as follows:  
Pages 1 and 2, approximately at the top of row 4 and at the beginning of column 6;
- Height of the barcode is 0.5 inch.
- Length of the barcode is approximately 2 inches.
- Density of narrow bar width is set to 20 mils with resolution set to 300 dpi.
- Narrow to Wide Ratio is set to 2.
- A 1/4 inch minimum clearance (blank space) must surround the barcode with the exception of the text required to be printed underneath the barcode.
- DO NOT stretch the barcode image.
- The required barcode is YBT171 for page 1:



YBT171

The required barcode is YBT172 for page 2:



YBT172

The barcode includes the form number code (YB), type of form (T), form year (17), and page number (1) or (2). There are no hyphens.

- Use of the Department of Taxation's JPEG file of the barcode is preferable. The JPEG files can be found at our software vendor website.
- DO NOT use Windows Metafile Format (wmf). This format causes a very low read rate by the Department's IBML scanners.

### 5. QR Code

- A QR code is specific to the form. The property of the 2D symbology QR code is measured in CM.
- Placement of the QR code is as follows (see exhibit for exact placement):
  1. Page 1: 1.125 inches from the top edge of the form and 0.5 inch from the left edge of the form.
  2. Page 2: 1.1875 inches from the top edge of the form and 0.5 inch from the left edge of the form.
- Height of the QR code is 0.5 inch.
- Length of the QR code is 0.5 inch.
- Narrow Module Size is set to 0.18.
- Margin is set to 0.18.

**General Information and Scannable Specifications**

- Open space surrounding the QR code should be adhered to as much as possible.
- DO NOT stretch the QR code image.
- The required QR code for page 1 is SCHCR\_T 2017A 01:



The required QR code for page 2 is  
SCHCR\_T 2017A 02:



The QR code includes the form number code (SCHCR), an underscore, type of form (T), space, 4-digit form year (2017), 1-letter revision indicator, space and 2-digit page number (01) or (02). There are no hyphens.

- The human readable text for the QR code MUST be printed at the bottom of each page at 0.5 inch from the left edge of the form and the bottom of the human readable text is 0.25 inch from the bottom edge of the form utilizing 6 pt Helvetica font.
- Use of the Department of Taxation's JPEG file of the QR code is preferable. The JPEG files can be found at our software vendor website.
- DO NOT use Windows Metafile Format (wmf). This format causes a very low read rate by the Department's IBML scanners.

**6. Acetate overlays**

- Acetate overlays will be mailed to vendors listed on our Hawaii software vendor website who previously reproduced Schedule CR. If you are now reproducing Schedule CR, contact the Forms Coordinator for the acetate overlays. If your company is not listed and you are reproducing Schedule CR, please contact the Forms Coordinator.

SCHEDULE OF TAX CREDITS

TAX YEAR  
2017

YBT171

or other tax year beginning 12 - 12 - 1212 and ending 12 - 12 - 1212

Name(s) as shown on return

SSN(s) or Federal Employer I.D. No.

NAME (S) AS SHOWN ON RETURNXXXXXXXXXXXXXXXXXXXXXXX

123-45-6789 123-45-6789

Attach this schedule directly behind Form N-11, N-15, N-30, or N-70NP

PART I Nonrefundable Tax Credits

1 Income tax paid to another state or foreign country (N-11, N-15, & N-70NP filers)

(Attach copy of tax return(s) from other state(s) or federal Form(s) 1116. See

tax return instruction booklet for more information.) 1 123456789

2 Carryover of the Energy Conservation Tax Credit (attach Form N-323) 2 123456789

3 Enterprise Zone Tax Credit (attach Form N-756) 3 123456798

4 Low-Income Housing Tax Credit (attach Form N-586) 4 123456789

5 Credit for Employment of Vocational Rehabilitation Referrals (attach Form N-864) 5 123456789

6 Carryover of the High Technology Business Investment Tax Credit (attach Form N-323) 6 123456789

7 Carryover of the Individual Development Account Contribution Tax Credit (attach Form N-323) 7 123456789

8 Carryover of the Technology Infrastructure Renovation Tax Credit (attach Form N-323) 8 123456789

9 Credit for School Repair and Maintenance (attach Form N-330) 9 123456789

10 Carryover of the Hotel Construction and Remodeling Tax Credit (attach Form N-323) 10 123456789

11 Carryover of the Residential Construction and Remodeling Tax Credit (attach Form N-323) 11 123456789

12 Carryover of the Renewable Energy Technologies Income Tax Credit (For Systems  
Installed and Placed in Service Before July 1, 2009) (attach Form N-323) 12 123456789

13 Renewable Energy Technologies Income Tax Credit (For Systems Installed and  
Placed in Service on or After July 1, 2009) (attach Form N-342)  
Place an X in the appropriate box to indicate the type of energy system installed and placed in service:  
• X Solar • X Wind 13 123456789

14 Capital Infrastructure Tax Credit (attach Form N-348) 14 123456789

15 Cesspool Upgrade, Conversion or Connection Income Tax Credit (attach Form N-350) 15 123456789

16 Renewable Fuels Production Tax Credit (attach Form N-352) 16 123456789

17 Organic Foods Production Tax Credit (attach Form N-354) 17 123456789

18 Total Nonrefundable Credits. Add lines 1 through 17. Enter here and on

Form N-11, line 35; N-15, line 52; N-30, line 14; or N-70NP, line 19.

Attach this schedule directly behind your Form N-11, N-15, N-30, or N-70NP. 18 123456789

ID NO 12

Schedule CR  
(Rev. 2017)

Page 2

Name(s) as shown on return

NAME(S) AS SHOWN ON RETURN  
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

SSN(s) or Federal Employer I.D. No.

123-45-6789  
123-45-6789

YBT172

PART II Refundable Tax Credits

- 19 Capital Goods Excise Tax Credit (attach Form N-312)..... 19● 123456789
- 20 Fuel Tax Credit for Commercial Fishers (attach Form N-163)..... 20● 123456789
- 21 Motion Picture, Digital Media, and Film Production Income Tax Credit (attach Form N-340)..... 21● 123456789
- 22 Renewable Energy Technologies Income Tax Credit (For Systems Installed and  
Placed in Service on or After July 1, 2009) (attach Form N-342)  
Place an X in the appropriate box to indicate the type of energy system installed and placed in service:  
● X Solar ● X Wind..... 22● 123456789
- 23 Important Agricultural Land Qualified Agricultural Cost Tax Credit (attach Form N-344)..... 23● 123456789
- 24 Tax Credit for Research Activities (attach Form N-346)..... 24● 123456789
- 25 Other refundable credits
- a. Pro rata share of taxes withheld  
and paid by a partnership, estate,  
trust, or S corporation on the sale  
of Hawaii real property interests.....25a 123456789
- b. Credit From a Regulated  
Investment Company.....25b 123456789
- c. Add lines 25a and 25b..... 25c● 123456789
- 26 Total Refundable Credits. Add lines 19 through 24 and line 25c. Enter here and on  
Form N-11, line 32; N-15, line 49; N-30, line 12; or N-70NP, line 17.  
Attach this schedule directly behind your Form N-11, N-15, N-30, or N-70NP. .... 26● 123456789

ID NO 12



Schedule CR  
(Rev. 2017)

STATE OF HAWAII—DEPARTMENT OF TAXATION  
**SCHEDULE OF TAX CREDITS**

**TAX YEAR**  
**2017**



YBT171

or other tax year beginning 12 - 12 - 1212 and ending 12 - 12 - 1212

Name(s) as shown on return

SSN(s) or Federal Employer I.D. No.

NAME (S) AS SHOWN ON RETURNXXXXXXXXXXXXXXXXXXXXXXX

123-45-6789 123-45-6789

**Attach this schedule directly behind Form N-11, N-15, N-30, or N-70NP**

**PART I Nonrefundable Tax Credits**

- 1 Income tax paid to another state or foreign country (N-11, N-15, & N-70NP filers)  
(Attach copy of tax return(s) from other state(s) or federal Form(s) 1116. See  
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- 2 Carryover of the Energy Conservation Tax Credit (attach Form N-323)..... **2●** 123456789
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- 4 Low-Income Housing Tax Credit (attach Form N-586) ..... **4●** 123456789
- 5 Credit for Employment of Vocational Rehabilitation Referrals (attach Form N-884) ..... **5●** 123456789
- 6 Carryover of the High Technology Business Investment Tax Credit (attach Form N-323) ..... **6●** 123456789
- 7 Carryover of the Individual Development Account Contribution Tax Credit (attach Form N-323)..... **7●** 123456789
- 8 Carryover of the Technology Infrastructure Renovation Tax Credit (attach Form N-323) ..... **8●** 123456789
- 9 Credit for School Repair and Maintenance (attach Form N-330) ..... **9●** 123456789
- 10 Carryover of the Hotel Construction and Remodeling Tax Credit (attach Form N-323)..... **10●** 123456789
- 11 Carryover of the Residential Construction and Remodeling Tax Credit (attach Form N-323) ..... **11●** 123456789
- 12 Carryover of the Renewable Energy Technologies Income Tax Credit (For Systems  
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- 13 Renewable Energy Technologies Income Tax Credit (For Systems Installed and  
Placed in Service on or After July 1, 2009) (attach Form N-342)  
Place an X in the appropriate box to indicate the type of energy system installed and placed in service:  
● **X** Solar ● **X** Wind..... **13●** 123456789
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- 15 Cesspool Upgrade, Conversion or Connection Income Tax Credit (attach Form N-350) ..... **15●** 123456789
- 16 Renewable Fuels Production Tax Credit (attach Form N-352) ..... **16●** 123456789
- 17 Organic Foods Production Tax Credit (attach Form N-354) ..... **17●** 123456789
- 18 **Total Nonrefundable Credits.** Add lines 1 through 17. Enter here and on  
Form N-11, line 35; N-15, line 52; N-30, line 14; or N-70NP, line 19.  
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ID NO 12





YBT172

Schedule CR  
(Rev. 2017)

Name(s) as shown on return NAME(S) AS SHOWN ON RETURNXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	SSN(s) or Federal Employer I.D. No. 123-45-6789 123-45-6789
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PART II Refundable Tax Credits

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    Investment Company.....25b 123456789
- c. Add lines 25a and 25b..... 25c● 123456789
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Attach this schedule directly behind your Form N-11, N-15, N-30, or N-70NP. .... 26● 123456789